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PERSONNEL
21 January 1956

FITNESS REPORT

SYNOPSIS: This regulation prescribes the policies, responsibilities, and procedures for the preparation of Fitness Reports which record supervisors' evaluations of employees assigned to positions at head-quarters.

This regulation also prescribes the headquarters procedures on Fitness Reports for employees assigned to foreign field installations.

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1. GENERAL

This regulation prescribes Agency policies, responsibilities, and procedures concerning the preparation of Fitness Reports for staff employees and staff agents. Employees at the supergrade level (GS-16, 17, 18) may be evaluated in memorandum reports prepared by their superiors or on the Fitness Report forms.

2. POLICY

- a. The Agency will continuously evaluate the performance and potential of its employees as a management and planning aid and will ensure that employees are informed concerning the effectiveness of their work performance.
- b. The Fitness Report will be used to record such evaluations periodically. It will consist of a two-part form, designed to provide a means of evaluating the productivity and the potential of employees:
 - (1) Form No. 45: Fitness Report (Part I) Performance will be used to provide the supervisor with a means of evaluating the productivity of the employee being rated. This part of the Fitness Report will be completed in all cases in which a report is required, and will be shown to the individual being rated at the time it is completed except that the supervisor may elect not to show the report, other than a report supporting an adverse action, when one or more of the following conditions prevails:
 - (a) When there exist unusual operational circumstances such as those at a small station where the rater and individual being evaluated are working and living in very close proximity and constant social interchange between them is necessary;
 - (b) When, for medical or psychological reasons, it would be ill-advised to show the individual the report;

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- (c) When security considerations preclude showing the report;
- (d) When the supervisor and individual being rated are so physically separated that it is impractical to show the report.

When the supervisor elects not to show the report to the individual being rated, for one or more of the above reasons, he shall give the reasons for his action in section B of part I. The individual will subsequently be shown the report by the head of his Career Service upon request, security considerations permitting.

- (2) Form No. 45: Fitness Report (Part II) Potential will be used to provide supervisors with a means of evaluating the potential and work environment characteristics of the employee being rated.
- (a) Completion of this part of the Fitness Report is required, for initial and annual reports only, for all personnel in grades GS-7 and above. Use of this part of the Fitness Report for personnel in grades GS-6 and below, for initial and annual reports, is permissive and its completion is encouraged for those performing in positions of a professional or technical nature. This part will not be shown to the individual being evaluated.
- (b) The policy of *not* showing this part to the rated individual does *not* preclude discussions, at appropriate times, between the supervisor and the rated individual of the potential and work environment characteristics of the employee being rated. These discussions, which are a desirable characteristic of proper supervisor/employee relationship, should not be related to the rendition of the Fitness Report.
- c. The Fitness Report is not designed to provide a numerical rating of an individual. It is Agency policy that no such rating, either numerical or otherwise, be applied to employees as a product of completed reports.

3. RESPONSIBILITIES

a. SUPERVISORS

- (1) Supervisors at all levels are responsible for the continuous evaluation of the performance and potential of employees under their immediate supervision and for the preparation of Fitness Reports in accordance with the provisions of this regulation.
- (2) The reviewing official is responsible for reviewing the report in order to ensure that it is fully completed. If he feels that the immediate supervisor has overevaluated or underevaluated the individual concerned, he will place his comments in the space provided on the form. He will also consider whether any action should be recommended on the basis of the report, and advise the supervisor with respect to taking such action. His signature on the report signifies agreement with the ratings unless otherwise noted.

b. DEPUTY DIRECTORS

The Deputy Directors are responsible for ensuring that Fitness Reports for all employees under their jurisdiction are prepared and transmitted in accordance with the provisions of this regulation.

c. THE DIRECTOR OF PERSONNEL

The Director of Personnel is responsible for administering the provisions of this regulation, for providing assistance and guidance to supervisors at all levels, and for reviewing the overall effectiveness of this evaluation program.

4. TYPES OF FITNESS REPORTS

a. INITIAL REPORT

Form No. 45: Fitness Report (Part I) Performance and (Part II) Potential will be prepared for each employee, as of nine months after his entrance on

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duty with the Agency. This report is of particular importance for selection purposes in providing a record of the supervisor's evaluation of the individual before completion of the twelve-month trial period. Preparation of the report by the current supervisor is required regardless of the length of time the employee has been under his jurisdiction. The current supervisor may request advice and information regarding any point covered by the report from others who have supervised the individual during the period covered. Normally, the Fitness Report must be completed and forwarded not more than 15 days after the indicated due date. Submission of a report may be delayed, however, for a period not to exceed 30 days beyond the due date in order to provide the supervisor with additional time to evaluate an employee who has been under his jurisdiction for a period of less than 90 days as of the due date of the report.

b. ANNUAL REPORT

A Fitness Report (Part I) Performance and (Part II) Potential will be prepared for each employee to cover the twelve months following the completion of the employee's first nine months of service and annually thereafter. The supervisor making the evaluation may request advice and information from others who have supervised the individual during the period covered by the report. The supervisor will defer the completion and submission of an annual report until the individual being rated has been under his jurisdiction for a period of 90 days, in order to adequately evaluate the employee.

c. REASSIGNMENT REPORTS**(1) Reassignment on Departure of Supervisor**

A supervisor who is to be reassigned or who is leaving the Agency will prepare Fitness Reports (Part I) Performance on employees under his immediate supervision before his departure.

(2) Proposed Reassignment of Employees Between Offices

A Fitness Report (Part I) Performance will accompany the Standard Form 52: Request for Personnel Action, requesting the reassignment of an employee between jurisdictions of Operating Officials except when a report has been prepared for some other purpose within the preceding 90 days. The report in these cases must be considered by the requesting office prior to initiating the Standard Form 52 and will be used by the Office of Personnel as a guide in considering approval of the proposed reassignment. Except in unusual cases, the Office of Personnel will not approve a proposed reassignment unless such a report is of record.

(3) Reassignment of Employee Within Areas of Jurisdiction of Operating Officials

A Fitness Report (Part I) Performance and Standard Form 52 will be prepared when an employee is reassigned within the area of jurisdiction of an Operating Official except when a report has been prepared within the previous 90 days. However, such a report will not be required if the reassignment involves neither a change of supervisors nor a significant change in the duties of the employee.

d. SPECIAL REPORTS

Other Fitness Reports will be prepared, as necessary, to meet the requirements of special circumstances.

5. REPORT PROCEDURES**a. INITIATION OF REPORTS**

- (1) Advance lists of initial and annual reports due will be prepared by the Office of Personnel and disseminated to Administrative or Personnel Officers on or before the 15th day of each month. These advance lists will contain the names of headquarters employees affected and the due dates and types of reports required.

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- (2) Reassignment reports will be prepared in accordance with the provisions of this regulation without advance notice from the Office of Personnel.
- (3) Special reports will be prepared as directed by the Operating Official concerned, or head of the Employee's Career Service Board, if different from the Operating Official.

b. PREPARATION OF REPORTS

The Fitness Report will be prepared in triplicate. The supervisor completing the report will transmit it to the reviewing official. After reviewing and signing the forms, the reviewing official will transmit all three copies to the Administrative or Personnel Officer concerned who will forward the original and one copy *directly* to the Office of Personnel and the second copy to the head of the Career Service Board concerned within 15 workdays following the expiration of the period covered by the report.

6. REPORTS OF UNSATISFACTORY SERVICE

A Fitness Report expressing the opinion that an employee should be separated or judging him to be incompetent will be accompanied by a copy of a warning memorandum notifying him of his deficiencies in performance. The warning memorandum will be prepared with the advice and assistance of the Office of Personnel in accordance with the procedures indicated in [] General Separation Actions.

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FOR THE DIRECTOR OF CENTRAL INTELLIGENCE:

L. K. WHITE
Deputy Director
(Support)

DISTRIBUTION: AB

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